[Title] MBNQA Stage 3 – Planning [This is a MS-Word version of the MBNQA Stage 3 flowchart. Any changes from the MS-Visio version are commented in brackets.]

Step 1
NIST Finalizes Site Visit Teams (Assigning "New Adds" When Necessary)
Step 2
NIST Identifies Stage 3 Team Leaders, Backups & NIST Monitors
Step 3
NIST Monitor Contacts Team Leader & Monitors Team Processes
Step 4
ASQ Sends Site Visit Materials to Team
Step 5
Team Leader & NIST Monitor Contact Applicant Official Contact Point (OCP)
Step 6
Team Leader & Backup Begin Planning Process; Create Schedule
Step 7
Team Leader & NIST Monitor Continue Contact with Applicant OCP
Step 8
Team Leader & Backup Coordinate:
- Planning Calls,
- Logistics (Also ASQ),
- Site Visit Issues (SVIs), and
- Site Visit Schedule (Including Travel Schedule)
Step 9
Team Leader & Backup Finalize Team Assignments (Item Leads, Backups)
Step 10
Team Leader & Team Members
Conduct Planning Call(s):
- Review Key Factors,
- Review Key Themes,
- Guidance on SVI Development,
- Schedule,
- Logistics, and
- Travel
Step 11
Team Members Develop SVIs for Assigned Items
Step 12
Team Members Develop SVI Strategies
Step 13
Team Members Review Each Other's SVI Worksheets
Step 14
Team Members Send Revised SVI Worksheets to Entire Team & NIST Monitor
Step 15
Team Leader Requests That Applicant Assemble Documents Referenced in Application & Other Planning Documents
Step 16
Team Leader Sets Tentative Agenda for Sunday Meeting
Step 17
Team Meets Sunday at Hotel to Review SVIs & Finalize Plans for Site Visit
Step 18
Onsite: Team Conducts Opening Meeting
Step 19
Team Caucus
Step 20

Team Leader, Backup & NIST Monitor Meet with Highest Ranking Official (HRO)
Step 21
Team Members Meet With Applicant Category Leads; Request Documents
Step 22
Team Members Conduct Other Meetings as Appropriate; Request Documents
Step 23
Every Day
If Possible, Caucus At Least Twice Each Day. Review Documents, etc. & Identify Any Missing Information. NIST Monitor Meets With OCP at End of Day to Debrief
Step 24
Every Evening
Conduct Meeting at Hotel or Call to Debrief:
- Review Documents,
- Identify Any Missing Information,
- Prepare/Revise Next Day's Schedule, and
- If Applicable, Complete SVI Worksheets & Post on Wall (Proceed with "Walk the Wall" Steps)
Step 25
Team Conducts Closing Meeting
"Walk the Wall" Steps
Step 26
Team Members Prepare SVI Worksheets & Post on Wall for Review
Step 27
All Team Members Review & Provide Input, Including NIST Monitor
Step 28
Team Members Finalize SVI Worksheets Based on Comments
Step 29
Team Members Revise Item Worksheets & Post on Wall for Review
Step 30
All Team Members Review & Provide Input
Step 31
Team Members Finalize Item Worksheets
Step 32
Team Members Discuss & Finalize Key Factors & Key Themes; Post on Wall for Review
Step 32
Team Members Review & Provide Input
Step 34
Team Revises Key Factors & Key Themes Based on Review
Step 35
Team Completes Score Summary Worksheet & Summary of Sites Visited
Step 36
Team Consolidates Computer Files
Step 37
Team Prints & Assembles Scorebook
Step 38
Examiners Sign Scorebook
Step 39
Team Leader & Backup Take Hard Copy and/or Disk of Site Visit Scorebook
Step 40
NIST Monitor Collects Applicant Documents, Calls OCP & Contacts Shipping Services
Step 41
Monitor Sends Scorebook to ASQ & Returns to NIST With Hard Copies & Disk of Scorebook
Step 42
Team Leader Reviews & Edits Site Visit Scorebook, As Needed, to Prepare for Judges' Meeting, Tech Edit & Call w/Lead Judge & Monitor
Step 43
Team Leader & Back Provide NIST With Contact Information for Days of Judges' Meeting

Step 44
Team Leader Gathers Contact Information for All Team Members for Days of Judges' Meeting
Step 45
Team Leader Continues to Prepare for Judges' Meeting & Tech Edit Call
Step 46
Judges' Meeting: Team Leader Participates in Judges' Meeting
Step 47
Team Leader Participates in Tech Edit Call With Lead Judge & NIST Monitor:
- Review Judges' Recommended Changes to Scorebook, and
- Provide Two-Way Feedback on Judges' Meeting
Step 48
NIST Generates Feedback Report & Sends to Applicant